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INTELLIGENCE BRIEF

FOREIGN SHIPPING TO NORTH VIETNAM IN OCTOBER 1965

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FOREWORD

The data in this publication are preliminary and subject to modification as additional information becomes available. Significant changes may occur in data on ship arrivals and cargoes from Communist China and, to a lesser extent, in data on cargoes carried by ships of the Free World. Data on Soviet and Eastern European ship arrivals and cargoes and on Free World ship arrivals are not likely to be changed significantly. As required, changes will be reported in subsequent publications.

FOREIGN SHIPPING TO NORTH VIETNAM IN OCTOBER 1965*

Increasing signs of the effects of the war marked developments in North Vietnam's foreign shipping in October. No exports of cement were observed, probably the result of transport disruption and the need for cement in reconstruction. Because of the interdiction of the rail lines from the mines, apatite exports also remained at a standstill. There is evidence that exports to Hungary may decline sharply in the last quarter. Finally, import cargo has accumulated in large amounts in and around the port of Haiphong.

A total of 34 foreign merchant ships -- half of them Communist and half Free World -- called at North Vietnam's ports in October. A notable change from September was the increase in Free World ships from 11 to 17, but calls by Free World shipping were still below the monthly average for 1965, as follows:

	<u>September</u>	<u>October</u>	<u>Monthly Average January-October 1965</u>
Total	<u>30</u>	<u>34</u>	<u>43</u>
Communist countries	<u>19</u>	<u>17</u>	<u>20</u>
USSR	3	4	6
Eastern Europe	3	4	4
Communist China	13	9	10
Free World	<u>11</u>	<u>17</u>	<u>23</u>
Cyprus	0	1	Negl.
Greece	0	1	3
Norway	3	2	3
United Kingdom	8	13	11
Other	0	0	6

The volume of identified seaborne exports was only 74,000 metric tons (mt), the lowest monthly volume of the year. No exports of apatite or cement were identified. Exports of coal were at nearly the lowest level of the year because of reduced imports by Japan and because anticipated imports by Western Europe failed to materialize.

* The estimates and conclusions in this brief represent the best judgment of this Office as of 15 November 1965.

Identified seaborne imports amounted to 62,000 mt, 22 percent above the monthly average for the first ten months of the year. Imports of petroleum (22,000 mt) and of bulk foodstuffs (16,400 mt) reached the highest monthly volumes of the year. No shipments of arms or ammunition were identified.

New amendments to US foreign assistance legislation provide, under certain conditions, for the cutting off of US aid to those countries whose ships call at North Vietnamese ports. The new legislation can be expected to have little deterrent effect on Free World shipping to North Vietnam, because British-flag ships are now the main Free World carriers. Moreover, a number of the Free World ships trading with North Vietnam are expected to continue in this trade after changing their registries to countries not affected by the US legislation.

1. Communist Shipping

The 17 calls made by Communist ships at North Vietnam in October represent the second lowest monthly total of this year and were 3 less than the monthly average for the first ten months of 1965. Both Soviet and Chinese Communist ships made fewer calls than usual. Chinese ships, with nine calls, accounted for more than half of the Communist total. Soviet and Polish-flag ships made four calls each.

Despite their relatively low number, Communist ships accounted for half of the foreign merchant ship arrivals at North Vietnam in October and continued to increase their share of the carriage of North Vietnam's seaborne trade as follows:

Percent of Identified Seaborne Trade
Carried by Communist Ships

	<u>October 1965</u>	<u>January-September 1965</u>
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Total	40	31
Imports	59	68
Exports	25	18

[REDACTED] Soviet crews are receiving bonuses of between 130 and 150 percent of base pay, compared with the 100 percent bonus that has become the standard for crews of Free World ships.

II. Free World Shipping

Seventeen Free World ships entered North Vietnamese ports in October. This was the highest number of calls by Free World ships since July but was below the monthly average thus far this year. British-flag ships continued to predominate, accounting for 13 of the 17 port calls. Norwegian ships made two calls, and single visits were made by ships of Greek and Cypriot registry.

The continued lack of appetite for export was the principal factor retarding Free World shipping in October. The withdrawal of Free World shipping from trade with North Vietnam has been occurring gradually since last January as US involvement has increased. This trend, however, probably has not run its full course.

Additional temporary withdrawals of Free World ships under certain flags may be stimulated by recent amendments of US foreign assistance legislation which provide, under certain conditions, for the halting of US aid to countries whose ships call at North Vietnamese ports. In the long run, however, the effectiveness of the legislation probably will be diluted as ships change registry to countries unaffected by the legislation.

Nearly all of the Free World ships trading with North Vietnam in October were known to be chartered to Communist countries. At least 11 of the 13 UK-flag ships were operating under time charter to Communist China, and two of the 11 were under subcharter to North Vietnam. The Greek-flag ship also was chartered to Communist China and the Cypriot-flag ship to North Vietnam. Both Norwegian ships were under Soviet charters to carry fruit to Soviet Far East ports.

Free World ships carried 60 percent of North Vietnam's identified seaborne trade in October. Only four Free World ships carried cargoes to North Vietnam, consisting mainly of bulk foodstuffs and fertilizers, which amounted to about 41 percent of North Vietnam's identified seaborne imports. All 12 Free World ships that departed from North Vietnam in October were fully loaded and carried 75 percent of all identified seaborne exports from North Vietnam. Eight of these ships carried coal to Communist China and Japan, three carried fruit to the Soviet Far East, and one carried pig iron to Japan. The export of pig iron to Japan was the first observed export of this commodity since August.

S-E-C-R-E-T

The smaller Japanese importers of North Vietnamese anthracite have continued to press the Japanese Shipowners Association to return their ships to the North Vietnam trade (from which they were withdrawn last March) because these importers are having difficulty in arranging transport of coal from North Vietnam. Their difficulties stem more from a shortage of small carriers than from a general lack of tonnage. In spite of the pleas of these coal importers and additional pressure from leftist trade promotion associations, Japanese shipowners remained adamant in refusing to allow their ships to risk voyages to North Vietnam.

Another demonstration of continuing concern for the risks entailed by calls at North Vietnamese ports involved a Greek-flag ship under Chinese Communist charter to carry flour from Italy. The Chinese failed to overcome the captain's refusal to land his cargo at Haiphong. Consequently, the flour will be offloaded at a Chinese port and will have to be transshipped to North Vietnam.

III. Cargoes

The volume of identified seaborne cargoes moving through North Vietnam's maritime ports in October was 136,000 mt, the highest monthly total since July. Seaborne imports were relatively large, but seaborne exports were the smallest of any month of this year.

Import cargoes totaled 62,000 mt, compared with the monthly average of about 50,000 mt for the first three quarters of this year. Imports consisted principally of petroleum (22,000 mt), bulk foodstuffs (16,400 mt), and fertilizers (10,600 mt). Shipments of both petroleum and bulk foodstuffs were larger than in any previous month of 1965. All of the petroleum was carried from Soviet ports by Soviet ships. None of the seaborne cargoes delivered during October was identified as arms or ammunition.

Identified seaborne exports from North Vietnam in October amounted to 74,000 mt, compared with an average monthly volume of 138,300 mt in the first three quarters of this year. Coal accounted for 73 percent of seaborne exports, and the balance consisted of fruit, pig iron, and other general cargoes.

The main reason for the low volume of exports was the lack of apatite. This commodity was exported at the rate of 43,800 mt a month in the first half of this year, but none has been shipped since early in August. The shortage is a result of bomb damage to the rail line from the apatite mines at Lao Cai.

S-E-C-R-E-T

Seaborne exports of coal in October totaled only 54,000 mt, compared with the average monthly volume of 81,200 mt in the first three quarters. All of the coal exports went to Communist China (32,000 mt) and Japan (22,000 mt). The absence of coal shipments to Western Europe at this time of year may be an indication that some European coal importers are turning to other markets, following the increased US involvement in Vietnam.

The decline in coal shipments to Japan accounts for most of the 27,200 mt gap between the volume of North Vietnamese exports of coal in October and the average monthly volume for the first three quarters. The second quarter was the only period of this year in which Japanese importers received their proclaimed quota of 50,000 mt a month. Their imports averaged only 37,300 mt a month in the third quarter and reached a new low for the year in October. Some Japanese firms reportedly have cut back imports of North Vietnamese coal after finding themselves overstocked because of a general decline in industrial activity. At the same time, however, some of the smaller coal importers are claiming that shipping problems are preventing them from getting North Vietnamese anthracite in sufficient quantities.

These reports are not necessarily contradictory. The smaller importers probably are having difficulty in hiring the small coal carriers that can most economically distribute the relatively low-volume shipments that their facilities can accommodate. The Japanese ships of about 2,800 GRT that were withdrawn from the coal runs to North Vietnam last March were well suited to their requirements, but most of the Free World ships currently servicing North Vietnam's coal trade are considerably larger, averaging well over 5,000 GRT.

The complete absence of exports of cement also contributed to the low volume of seaborne exports from North Vietnam in October. Although shipments of cement have fluctuated from month to month, the following data reveal a distinct decline in the volume of cement exports since the first quarter of this year:

	Monthly Average (Thousand Metric Tons)
1964	11.7
1965	
First Quarter	11.6
Second Quarter	7.3
Third Quarter	4.4

One possible explanation for the decline is that exports have been cut back to meet increased domestic requirements, particularly for military construction and for the reconstruction of bomb-damaged structures. Production also may have been hampered by occasional disruptions to the supply of the 33,000 mt of gypsum required annually by North Vietnamese cement plants. Although all other materials are available locally, the gypsum is supplied by Communist China. If the Chinese gypsum had been shipped over land routes to North Vietnam, shipments probably have been disturbed by transportation delays, thereby reducing both cement production and the surplus available for export. An alternative explanation for the decline in identified exports of cement is that Communist China may be taking more North Vietnamese cement. Cement exports carried by Communist Chinese ships could go undetected.

North Vietnam's worsening export position makes it unlikely that the 1964 volume of seaborne exports will be surpassed this year, even though the volume to date is in excess of the 1964 level. There is evidence that exports to Hungary, which were on schedule up to September, may fall 20 percent short of plan by the end of the year.

An experienced observer visiting Haiphong in October reported accumulations of import cargo in and around the port area. Comparisons of the volume of general cargoes shipped through Haiphong on foreign flag merchant ships in 1964 and in the first ten months of this year provide no explanation for the congestion. Furthermore, Haiphong's transport links with Hanoi and other major industrial centers are considered to have remained capable of carrying without difficulty the normal volumes of cargoes that pass through the port. If cargo congestion does exist, it is attributable to disorganization or to increased imports on Chinese Communist ships, the volume and nature of which are identified only rarely.

Table 1

Foreign-Flag Ship Arrivals in North Vietnam
September, October, and Cumulative January-October 1965

Flag	September ^{a/}		October		Cumulative January-October ^{a/}	
	Num- ber	Percent of Total ^{b/}	Num- ber	Percent of Total ^{b/}	Num- ber	Percent of Total ^{b/}
Total	<u>30</u>	<u>100.0</u>	<u>34</u>	<u>100.0</u>	<u>434</u>	<u>100.0</u>
Communist countries	<u>19</u>	<u>63.3</u>	<u>17</u>	<u>50.0</u>	<u>205</u>	<u>47.2</u>
USSR	3	10.0	4	11.8	62	14.3
Eastern Europe	3	10.0	4	11.8	41	9.4
Albania					1	0.2
Bulgaria					2	0.5
Czechoslovakia					4	0.9
Poland	3	10.0	4	11.8	34	7.8
Communist China	13	43.3	9	26.5	102	23.5
Free World	<u>11</u>	<u>36.7</u>	<u>17</u>	<u>50.0</u>	<u>229</u>	<u>52.8</u>
Cyprus			1	2.9	2	0.5
France					1	0.2
Greece			1	2.9	26	6.0
Italy					1	0.2
Japan					37	8.5
Lebanon					9	2.1
Liberia					3	0.7
Malta					2	0.5
Netherlands					5	1.2
Norway	3	10.0	2	5.9	28	6.5
Panama					1	0.2
United Kingdom	8	26.7	13	38.2	114	26.3

a. Including one additional Chinese Communist ship, not previously reported, which arrived in September.

b. Because of rounding, components may not add to the totals shown.

Table 2

Tonnage of Foreign-Flag Ship Arrivals in North Vietnam ^{a/}
September, October, and Cumulative January-October 1965

Flag	September ^{b/}		October		Cumulative January- October ^{b/}	
	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons
Total	<u>30</u>	<u>145.6</u>	<u>34</u>	<u>178.6</u>	<u>434</u>	<u>2,120.0</u>
Communist countries	<u>19</u>	<u>81.7</u>	<u>17</u>	<u>85.6</u>	<u>205</u>	<u>1,028.0</u>
USSR	3	23.9	4	28.7	62	398.4
Eastern Europe	3	19.1	4	27.7	41	282.5
Communist China	13	44.1	9	29.3	102	347.1
Free World	<u>11</u>	<u>58.5</u>	<u>17</u>	<u>93.0</u>	<u>229</u>	<u>1,092.1</u>

a. Many Soviet and Eastern European ships calling at North Vietnamese ports pick up or discharge only small parts of their total cargoes in North Vietnam, and many of the Free World ships only pick up export cargoes. For this reason, with the possible exception of Chinese Communist ships, aggregate tonnage of ships calling is not closely correlative to actual volume of cargoes moving into and out of North Vietnam, but these data are of value as indications of relative changes in the volume of shipping. Because of rounding, components may not add to the totals shown.

b. Including an additional Chinese Communist ship of 5,614 GRT, not previously reported, which arrived in September.

Table 3

Identified North Vietnamese Imports Carried by Foreign-Flag Ships a/
October 1965

							Thousand Metric Tons
Flag	Commodity						Total
	Ammonium Sulfate and Other Fertilizers	Petroleum	Grain and Other Foodstuffs	Pyrites	Timber	Miscellaneous	
Total	<u>10.6</u>	<u>22.0</u>	<u>16.4</u>	<u>2.7</u>	<u>1.9</u>	<u>8.4</u>	<u>62.0</u>
Communist countries	<u>2.6</u>	<u>22.0</u>	<u>1.1</u>	<u>2.7</u>	<u>1.9</u>	<u>6.0</u>	<u>36.3</u>
USSR	2.6	22.0		2.7	1.9	1.5	30.7
Eastern Europe						4.2	4.2
Communist China <u>b/</u>			1.1			0.3	1.4
Free World	<u>8.0</u>	<u>0</u>	<u>15.3</u>	<u>0</u>	<u>0.0</u>	<u>2.4</u>	<u>25.7</u>

a. Identified imports include some estimates of bulk cargoes using methods which have proved to be highly reliable.

b. An additional unknown quantity of imports was carried by Chinese Communist ships.

Table 4

Identified North Vietnamese Exports
Carried by Foreign-Flag Ships a/
October 1965

Thousand Metric Tons						
Flag	Commodity					Total
	Coal	Apatite	Cement	Pig Iron	Miscellaneous	
Total	<u>54.0</u>	<u>0</u>	<u>0</u>	<u>3.3</u>	<u>16.8</u>	<u>74.0</u>
Communist countries	<u>5.0</u>	<u>0</u>	<u>0</u>	<u>0.0</u>	<u>13.6</u>	<u>18.6</u>
USSR					8.7	8.7
Eastern Europe					2.6	2.6
Communist China <u>b/</u>	5.0				2.3	7.3
Free World	<u>49.0</u>	<u>0</u>	<u>0</u>	<u>3.3</u>	<u>3.1</u>	<u>55.4</u>

a. Identified exports include some estimates of bulk cargoes using methods which have proved to be highly reliable. Because of rounding, components may not add to the totals shown.

b. An additional unknown quantity of exports was carried by Chinese Communist ships.

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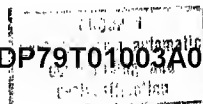
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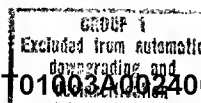
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34.4643-C (CB 65-67)

ANALYST

BRANCH

T/IS

EXTENSION

9484 (2)

SECURITY REVIEW

ITEM

DATE

INITIALS

22 Nov 65 / MRS SANITIZING INSTRUCTIONS

UNEDITED DRAFT

EDITED DRAFT

Front & back cover, delete "NFD"
Remove page 11.

25X1A

25X1C

SUBSTITUTE

25X1D

REMARKS

approved by SpINT at the

Secret level - see attached.

clearance on FI source pending.

19 Nov 65 MRS

FI source approval for release
(see attached)

19 Nov 65 MRS

25X1C

~~SECRET~~